



PHS

PLANTING SEEDS. GROWING LIVES.

100 N. 20th Street - 5th floor, Philadelphia, PA 19103-1495 • 215-988-8800 • Fax: 215-988-8810 • PHSonline.org

Procedure for making a Gift of Stock to The Pennsylvania Horticultural Society

Gifts of securities are simple to donate and may provide favorable tax benefits. Appreciated securities, held for more than one year, may be deducted from taxable income without paying a capital gains tax on the appreciated portion of the gift. Gifts of securities are credited on the date of transfer to PHS and are valued at the mean of the high and low quoted sales price on that day.

Stock may be donated in one of the following ways:

1. By electronic transfer Depository Trust Company (DTC) of the shares between your broker and PHS's broker at Charles Schwab & Co. Please call the Development office at 215-988-8766 to notify PHS of your plans to make a gift of stock. **Stock transferred in this fashion is valued on the date of the transfer.**

Broker: Charles Schwab & Co.

Contact person: **Olga Nosowski 610-977-0252**

Account Name: Pennsylvania Horticultural Society

Account #: 5926-2561

DTC #: 0164

Code #: 40

Tax ID #: 23-1352265

From whom the stock gift is credit of: Your Name / Name of Donor

2. By sending stock certificates and a stock power to PHS in separate envelopes. **If stock certificates are mailed, the value of the gift for the donor's tax purposes is calculated using the date of the postmark on the envelope.**
 - Send the stock certificate to Jennifer Shepard at the below address. Please do not sign your stock certificate.
 - In a separate envelope, please send your executed stock power with your signature guaranteed by your personal banker.

It is important for us to know the identity of the donors of all securities gifts in order to give prompt and accurate credit for all gifts received. Particularly in the case of an electronic transfer, it is often very difficult to obtain this information after the transaction is processed. Therefore, in addition to instructing your broker to include your name and address in the DTC transfer instructions, please contact:

Jennifer Shepard
Vice President of Development
PHS
100 N. 20th Street, 5th Floor
Philadelphia, PA 19103

jshepard@pennhort.org
Phone: 215-988-8766
Fax: 215-988-8810